



2010 RETAILER GUIDEBOOK

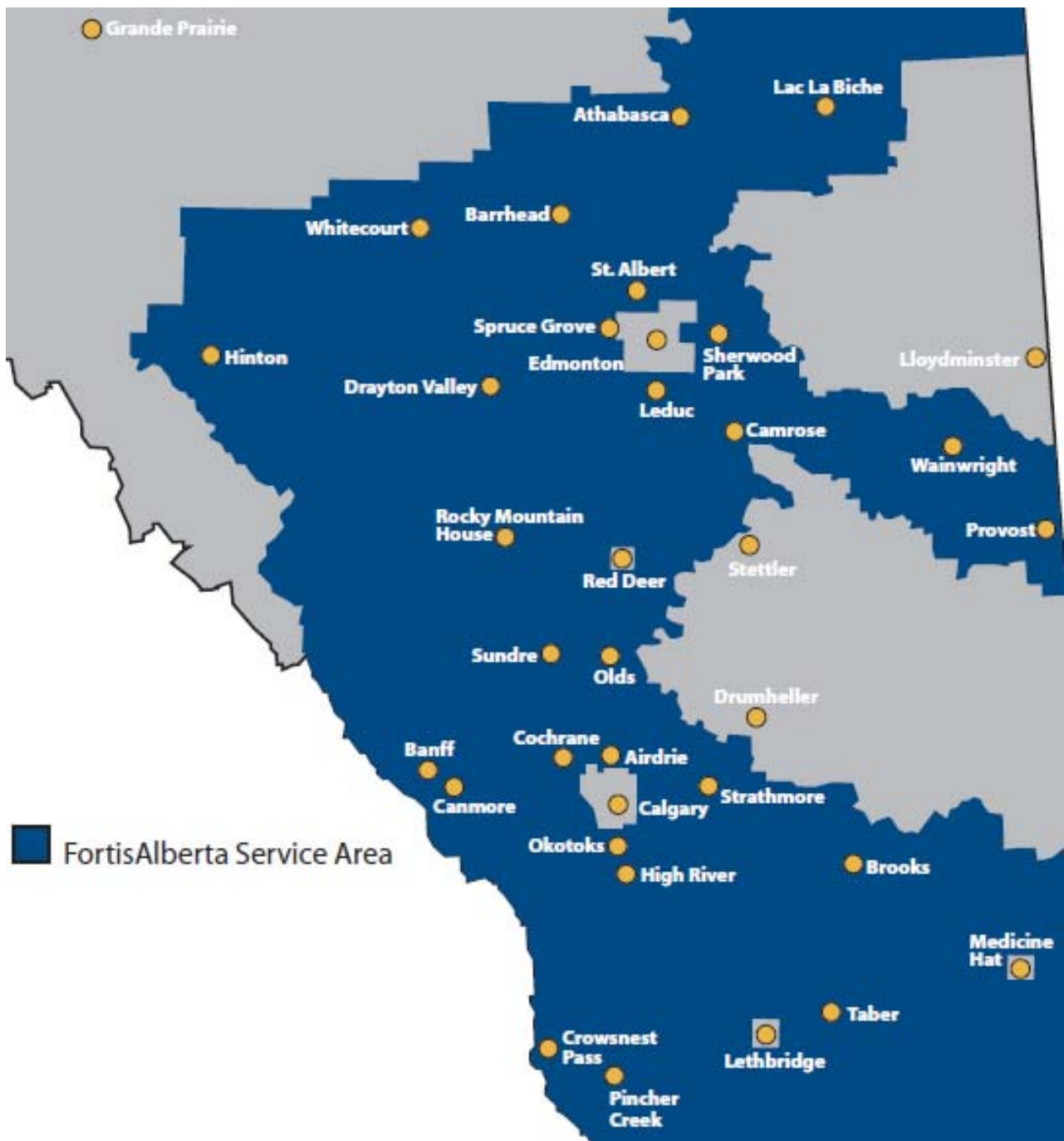
Customer Service



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FortisAlberta Service Area



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INTRODUCTION TO THE FORTISALBERTA RETAILER GUIDEBOOK

The FortisAlberta Retailer Guidebook has been assembled to communicate the essential information required by Retailers regarding participation in the provision of Retailer Access Services within FortisAlberta's regulated service area. *The Electric Utilities Act* defines a Retailer as "a person who sells or provides electricity services directly to the Customer". The Retailer may be independent or affiliated with a Wire Owner (WO). A Customer may also act as a Self-Retailer by carrying out Retailer functions to obtain electricity solely for the Customer's own use.

The Retailer Guidebook outlines FortisAlberta's Retailer Certification Requirements and the necessary steps to provide Retailer Access Services in the FortisAlberta Service Area. This includes key business processes, information exchange requirements and Government of Alberta Acts, Regulations, Codes and Rules. The Guidebook also includes links to the FortisAlberta Distribution Tariff and related policies that must be understood by Retailers and WOs. A key objective of this document is to provide Retailers with a tool to assist them in aligning their processes, practices and information systems with those of FortisAlberta.

Retailers should be aware that under the *Federal Electricity and Gas Inspection Act* and related regulations, all persons selling electricity based on units of measurement must register with Measurement Canada. The Act and Regulations are available at:

[http://www.ic.gc.ca/eic/site/mc-mc.nsf/vwapj/CompliancePolicy_EGIA_e.pdf/\\$file/CompliancePolicy_EGIA_e.pdf](http://www.ic.gc.ca/eic/site/mc-mc.nsf/vwapj/CompliancePolicy_EGIA_e.pdf/$file/CompliancePolicy_EGIA_e.pdf) or you may contact Measurement Canada at (403) 292-5605 or (780) 495-2491 for further information. Self-Retailers must also comply with any applicable Regulations but do not require a license or registration with Alberta Energy.

FortisAlberta reserves the right to update this document as required to address the ever-changing Alberta electrical industry; which includes but is not limited to business processes, practices, information systems or rate filings. The most up to date version of this document is posted on FortisAlberta's website at www.FortisAlberta.com under Retailers → New Retailers <http://www.FortisAlberta.com/default.aspx?cid=94&lang=1>.

RESPONSIBILITIES OF THE STAKEHOLDER RELATIONS MANAGER

The Stakeholder Relations Manager's (SRM) role is to develop and maintain business relationships with external stakeholders (including Customers, Retailers, Load Settlement Agents (LSA), WOs, and Government Agencies) to establish, document and communicate process updates. The SRM provides support for escalations at a management level and resolves any breakdowns that may occur between Retailers and FortisAlberta.

The Stakeholder Relations Manager – Retail Contacts:

SRM General E-mail: RetailAcctReps@FortisAlberta.com

Kirsten Lojek	Allison Thomas
Stakeholder Relations Manager	Stakeholder Relations Manager
(403) 514-4572 Direct Line	(403) 514-4386 Direct Line
(403) 514-5572 Fax	(403) 514-5386 Fax
(403) 510-9366 Cellular	(403) 801-7101 Cellular
Kirsten.Lojek@FortisAlberta.com	Allison.Thomas@FortisAlberta.com

Dave Hunka
 Manager, Customer Relations
 (780) 464-8311 Direct Line
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Dave.Hunka@FortisAlberta.com

Mailing Address:

FortisAlberta Inc.
 ATTENTION: Kirsten Lojek or Allison Thomas
 320 17 Avenue S.W.
 Calgary, Alberta T2S 2V1

RESPONSIBILITIES OF THE RETAIL SUPPORT TEAM

The Retail Support team investigates and provides resolution for all Customer complaints and requests, whether they are initiated by an outside agency, Retailer, Self-Retailer, Industrial Customer, Rural Electrification Association (REA), or internal stakeholders. The Retail Support Team is the first point of contact regarding Retailer issues from the Alberta Utilities Commission (AUC), the Office of the Utilities Consumer Advocate (UCA) and most internal FortisAlberta departments, particularly Operations.

The Retail Support Team is comprised of five Customer Relations Coordinators, whose primary focus is to monitor the compliance systems and ensure the success of direct data flow. The Retail Support Team is also the point of contact to verify meter install requests, verify meter connection status, confirm orders, provide reasons for order failures and rectify escalations for meter installations.

The Retail Support Team reviews, assigns and manages the Retailer Inquiry Tracking System (RITS) Database and General Tracking System (GTS), in addition to managing all of the applications used to track Customer and Retailer inquiries.

Retail Support Team
 (403) 514-4990 Direct Line
RetailSupport@FortisAlberta.com

DISTRIBUTION CUSTOMER APPLICATION AND QUALIFICATION

Terms and Conditions (T&Cs) of Distribution Access Service

FortisAlberta, in its role as a WO, will carry out the necessary functions to:

- Provide electric facilities to end-use Customers in its service area.
- Allow Customers to purchase electricity from a Retailer in accordance with the provisions of the Electric Utilities Act (EUA) and existing Regulations.

The FortisAlberta Customer/Retailer T&Cs of Distribution Access Service are available on FortisAlberta's web site at www.FortisAlberta.com under Home → Quick Links → Distribution Tariff.

<http://www.FortisAlberta.com/Default.aspx?cid=191&lang=1>

The Retailer T&Cs of Distribution Access Service are intended to govern the relationship between FortisAlberta and Retailers or any party who acts as an agent on behalf of a Retailer for transactions including, but not limited to, Retailer billing and Load Settlement. These Retailer T&Cs govern the relationship between FortisAlberta and a Customer of a Retailer or any other party acting as an agent on behalf of the Customer in their dealings with FortisAlberta.

The Customer T&Cs of Distribution Access Service are intended to govern the relationship between FortisAlberta and Customers regarding the provisions of wire service on FortisAlberta's electric distribution system. These Customer T&Cs will also govern the relationship between FortisAlberta and a Retailer or any other person whom the Customer has assigned to act on its behalf in its dealings with FortisAlberta.

Conditions for Providing Distribution Access Service to Retailers

A Retailer must fulfill the following requirements before FortisAlberta can provide or continue to provide Distribution Access Services to the Retailer. The Retailer must:

- Meet and maintain the Prudential Requirements set out in ARTICLE 6.1 – PRUDENTIAL REQUIREMENTS of the FortisAlberta Retailer T&Cs of Distribution Access Service.
- Exchange energy through the Alberta Electric System Operator (AESO).
- Comply with the provisions of the Fair Trade Act (FTA).
- Conduct business in Alberta as a licensed Retailer of electricity services pursuant to the FTA and other applicable Statutes, Regulations and Codes.
- Provide FortisAlberta's SRMs with a copy of the Retailer's license issued pursuant to the FTA.
- Enter into a Retail Service Agreement (RSA) with FortisAlberta and with FortisAlberta acting as a Wire Service Provider (WSP) on behalf of an REA when enrolling REA Customers in the following areas:
 - Armena REA
 - Drayton Valley REA
 - Ermineskin REA
 - Kingman REA
 - Lindale REA
 - Mayerthorpe & District REA
 - Montana REA
 - Niton REA
 - Peigan REA
 - Stony Plain REA
 - Tomahawk REA

- VNM REA
- Wildwood REA
- West Liberty REA
- West Wetaskiwin REA
- Comply with the AUC Rule 021: Settlement System Code Rules (SSC) available on the AUC's web site at <http://www.AUC.AB.ca/Acts-Regulations-and-AUC-Rules/rules/Pages/Rule021.aspx>.
- Meet the requirements for information exchange set out in the SSC Rules to FortisAlberta's satisfaction.
- Meet any other requirements that FortisAlberta, acting reasonably, may impose.

Responsibility for Electric Purchases

The Retailer is solely responsible for the purchase of electricity through the AESO and for arranging the delivery of electricity to the point of service for Customers, as per FortisAlberta T&Cs of Distribution Access Service.

Arrangements with Customers

Unless otherwise stated herein, the Retailer shall be solely responsible for having appropriate contractual or other arrangements with Customer(s) necessary to provide service to Customer(s). FortisAlberta shall not be responsible for monitoring, reviewing or enforcing such contracts or arrangements and shall have no liability for such Customer arrangements.

Providing a List of Authorized Persons to FortisAlberta

The Retailer shall e-mail FortisAlberta's SRM with a current list, as any changes occur of Authorized Persons of the Retailer who are authorized to communicate with FortisAlberta in relation to Distribution Access Service. All persons named in accordance with this Section shall be Authorized Retail Representatives for the Retailer's Load Settlement.

FORTISALBERTA COMPLIANCE TESTING PROCEDURES

Purpose

The purpose of testing is to verify that the Retailer is capable of complying with the data transfer standards as specified in the SSC, and has the necessary technical environment to send, receive, and translate the standard transactions to do business in the Alberta electrical utility market and specifically with FortisAlberta. The installation and configuration of hardware and software as well as the establishment of communications are the responsibility of the Retailer. The stated requirements must be completed prior to the initial testing process.

Communication Hardware

Participants in the Alberta market will require either DropChute™ Enterprise V3.02 or DropChute™ Pro V3.02 to exchange data with the FortisAlberta DropChute™ server.

Retailer System Readiness

Minimum requirements for system readiness for Retailers associated with FortisAlberta are as follows:

- Retailers will install and configure DropChute™ the standard information exchange package defined in the SSC. Technical staff from FortisAlberta will work with the Retailer to establish connection and other system configuration/technical requirements.
- Obtain a VeriSign Class #1 Digital ID (Certificate) with the low security option and a 1024 bit key length.
- Obtain a valid e-mail ID for use as the DropChute™ unique name.
- Obtain a Static IP address of DropChute™ Server if applicable
- Register FortisAlberta as a DropChute™ table entry.

Prior to testing, the above information should be submitted to FortisAlberta:

FortisAlberta Inc.
ATTENTION: Kirsten Lojek or Allison Thomas
320 17 Avenue S.W.
Calgary, Alberta T2S 2V1
RetailAcctReps@FortisAlberta.com

Test Plan

Once the application is submitted, validated and approved by FortisAlberta, Retailers will receive appropriate documentation and information to allow connection to the FortisAlberta server through DropChute™, at which time testing can commence.

LOAD SETTLEMENT RESPONSIBILITIES

The rule-making responsibility for the SSC has moved from the AESO to the AUC effective January 1, 2008. As the SSC may change in format and content, references contained within this document may change or become obsolete.

All market participants including the LSAs must comply with the SSC. FortisAlberta as a WSP performs the function of Load Settlement within its distribution service territory as described in the SSC.

For a copy of the current version of the SSC, visit the AUC website at <http://www.Auc.Ab.Ca/acts-regulations-and-auc-rules/rules/Pages/Rule021.aspx>.

FortisAlberta has attempted to summarize the SSC and FortisAlberta's responsibilities within this section of the Retailer Guidebook; however, Retailers must read and be in compliance with the SSC as a condition of Retailing within FortisAlberta's service territory.

In implementing Load Settlement, several options are available to WSPs. In some cases, the choices are available because the SSC provides more than one option or leaves decisions to the WSPs discretion. In other cases, certain enhanced functions of a settlement system are not covered by the standards.

What is Load Settlement?

WSPs are required to provide the Load Settlement functions to facilitate an hourly electricity market between the AESO and Retailers.

Deregulation allows multiple Retailers to enroll Customer sites at one Point of Delivery (POD). The Customer sites may or may not have hourly interval metering. In fact, the vast majority of Customers have meters that are read on a cumulative basis over a period of typically 30 to 65 days.

In order for the AESO to determine how much energy was actually consumed by each Retailer per hour, it would be necessary to install hourly interval meters at each Customer site in the province. Since hourly global interval metering is expensive and currently only available at the larger Customer sites, global interval metering is not justified. Thus, the hourly consumption attributed to each Retailer is estimated by the Load Settlement function. Load Settlement employs a load profiling methodology to spread periodic or cumulative meter reads (normally performed monthly or bi-monthly) across hours.

Load Settlement has two main processes:

1. Track the enrollment of sites between Retailers
 - Determine the Retailer of Record for a given day.
 - Manage the Retailers Site ID relationship for Load Settlement purposes.
2. Report the hourly consumption by Retailer and the daily consumption by site which includes distribution line losses and unaccounted for energy (UFE) to the Retailers and the AESO.

Retailer Enrollment

FortisAlberta as the LSA manages enrollment processing, including the creation of Retailer/Site ID assignments as well as any switches between Retailers (excluding Self-Operating REA

sites). The LSA has no policing responsibility of the switches, so FortisAlberta is not responsible to verify that the Retailer obtained switch authorization from the Customer. The Retailer is required, by Regulations, to obtain switch authorization and the Market Surveillance Administrator (MSA) enforces these Regulations.

Select Retailer Request (SRR)

The SRR transaction is issued by a Retailer to the LSA in order to enroll a Customer's Site ID. A Retailer can obtain a Customer's Site ID using the Retail Site Catalogue published by the WO responsible for the Customer's site. The Retailer can henceforth determine the appropriate LSA for the enrollment requests. FortisAlberta updates the Retail Site Catalogue daily and it is available at www.FortisAlberta.com Retailers → Retailer Resources. The file is a Microsoft Excel CSV file. Install WinZip to uncompress this file. To purchase a copy of WinZip please visit www.WinZip.com.

<http://www.fortisalberta.com/Resources.aspx?cid=238&lang=1>

Customers can enroll (switch Retailer ID's) on a daily basis as all switches are effective at midnight. The enrollment settings and FortisAlberta's internal policies are indicated in Table 1 below. Please note that FortisAlberta processes enrollment requests upon receipt at DropChute™ with effective dates as per the table below.

Please refer to Section 7.4 - Enrollment Mechanics of the Settlement System Code.

Table 1

ENROLLMENT PRIORITY CODE SETTINGS	FORTISALBERTA'S PRIORITY CODE SETTINGS AND ENROLLMENT PRIORITY CODES WILL BE HANDLED AS FOLLOWS:
PRIORITY CODE 1	Processed upon receipt of the enrollment request, effective at the start of the next calendar day. <ul style="list-style-type: none"> • Example 1 – the switch request is received by FortisAlberta on Monday, the switch is effective Tuesday at 00:00:00 hours. • Example 2 – the switch request is received by FortisAlberta on Friday, the switch is effective Saturday at 00:00:00 hours.

WSPs are only required to support Priority 1 requests. Priority 1 enrollment indicates that, the first enrollment received on a given day becomes the Retailer of Record for the site effective midnight at the start of the next calendar day and as a result, the Retailer may not request an enrollment for a date greater or less than 1 calendar day away.

Switches do not require a meter read. The time of the switch is deemed to occur at midnight to ensure that each 24-hour day is allocated to the Retailer of Record for that day. Partial days are not allowed. FortisAlberta will provide off-cycle meter reads upon request, at a cost to the Retailer. The fee schedule is outlined in the Appendix A - Fee Schedule included in this Guidebook. If the new Retailer requests an off-cycle meter read for the day of the switch, FortisAlberta does not guarantee the timing of the read.

Select Retailer Notification (SRN) / Notify Old Retailers (SRO)

The Retailer requesting enrollment is notified if the switch was successful and of the corresponding effective date. The prior Retailer that the Customer switched from is also notified; however, neither Retailer will know the identity of the other.

The former and current Retailers are each sent a “cumulative switch consumption estimate” when daily settlement is run for the effective switch date. That estimate is the consumption value that is subsequently generated for the specified Site ID from the last meter read to the switch date.

De-Select Request (DSR)

The DSR transaction enables a Retailer to notify a WSP that they will no longer provide electricity services for the site. The Retailer may request de-enrollment for several reasons, including but not limited to the following circumstances:

- Customer Moving Out
- Retailer Drops Customer
- Erroneous Enrollments

FortisAlberta only accepts electronic requests from Retailers who wish to discontinue as the active Retailer for a specific site. This electronic request is called a De-Select Request (DSR) and is submitted through the DropChute™ software. (See Table 37 – Section 9.6.8.2 of the SSC). If no *enrollment* request is received within 7 calendar days of having received the DSR, the Regulated Rate Provider (RRP) will enroll the site.

The Electric Utilities Act Regulation defines the RRP as a Retailer appointed by the owner that provides electricity services to eligible Customers in the owner’s service area under a Regulated Rate Option (RRO). An RRP must provide retail electricity services to a Customer that otherwise cannot secure a Retailer. Many of the rules and procedures surrounding transfer of Customers to the RRP are at the discretion of the individual WOs and WSPs, as defined by their T&Cs of Service.

Update Customer Information (UCI)

The UCI transaction contains pertinent Customer contact information required by WOs and WSPs to permit safe and secure operation of the wires environment. A Retailer submits a UCI transaction within 4 hours of submitting an SRR or whenever any of the information listed in the table below is known to the Retailer to have changed. If a UCI is not submitted within 4 hours of an SRR, the SRR transaction will fail, in which instance the Retailer would be required to resubmit the SRR and UCI.

FIELD ELEMENT #	INFORMATION HANDLING WITHIN FORTISALBERTA’S SYSTEM OF RECORD
7	Customer Company Name If a value exists, use this value to set up the business partner name.
8	Customer Last Name Use this value only if no Company name is provided.
9	Customer First Name Use this value only if no Company name is provided.
44	Customer Phone # Use only if field 59 has no value.
45	Customer Business Phone # Use only if field 60 has no value.
46	Customer Fax # Use only if field 61 has no value.
47	Customer Pager # Use only if field 62 has no value.
48	Customer Mobile Phone Use only if field 63 has no value.

52	Critical to Have Power Flag	This field is used to notify staff that the site is sensitive to outages.
53	Critical to have Power Reason	The text in this field describes why the site is sensitive to outages.
59	Site Contact Phone #	Use value to update business partner record.
60	Site Contact Business Phone #	Use value to update business partner record.
61	Site Contact Fax #	Use value to update business partner record.
62	Site Contact Pager #	Use value to update business partner record.
63	Site Contact Cellular Phone	Use value to update business partner record.
64	Site Contact E-mail Address	Use value to update business partner record and for receiving notification detail of Planned Power Outages (PPO) via E-Mail.

Settlement Calculation Factors

Zone Definition: Generally, each WSP is responsible for settling the sites within its distribution system (or service territory). Each LSA can define the number of settlement zones for which settlement will be calculated separately. Currently, FortisAlberta has a single Settlement Zone ID - 1501. In accordance with Section 4.2.1 (2), FortisAlberta allocates consumption for Customers directly connected to the transmission system separately in a secondary zone within Zone 1501. UFE will not be allocated to these sites.

The total zone load is equal to the sum of its POD loads plus any embedded net distribution generation and distribution interchange points between other WOs and WSPs. The settlement approach is “global” and all Customers will be handled equally regardless of whether they remain on the RRO or move to a new Competitive Retail Supplier. Self-Retailers, defined as sites directly connected to generators will be handled in the same manner as any other site for Load Settlement purposes.

Settlement Interval: Settlement occurs at one-hour intervals.

Deemed Time-Of-Day: Cumulative meter reads and site energization/de-energization are at WSP discretion. FortisAlberta deems energization and de-energization to occur at the beginning of the date serviced (i.e. 00:00:00). Cumulative meter reads are populated with a deemed time value of midnight (i.e. 00:00:00).

Settlement Timing: For each day to be settled (“day of energy flow”), the settlement calculation is refined and reported in the following four stages:

1. Initial daily settlement within five (5) business days after the day of flow
2. Initial month-at-a-time (MAAT) Settlement within ten (10) business days of the end of the month of flow
3. Interim MAAT settlement within approximately three (3) months
4. Final MAAT settlement within approximately seven (7) months

Daily, Initial MAAT, Interim MAAT and Final MAAT settlement timing rules are specified in Section 4.4 of the SSC.

Profiling Methods: Under the SSC, the following profile generation methods are acceptable.

1. System residual is defined as:
 - = Total Zone - \sum interval metered - \sum deemed load - \sum load research based profile classes
 - \sum known distribution losses.

2. Load research sample based, in accordance with the accuracy standards set out in the SSC.
3. Deemed profiles.

Table 2 - FortisAlberta Profiles

FORTISALBERTA PROFILE	APPLICATION
NET SYSTEM LOAD SHAPE (NSLS) OR RESIDUAL	Uses the System Residual calculation (Total Zone - Σ interval metered - Σ deemed load - Σ known distribution losses) and is a dynamic and residual profile generated with each settlement run. Applies to sites without interval meters that do not qualify for any of the deemed profiles. Net System Load Shape data and the other profiles are available at www.FortisAlberta.com under Retailers → Load Settlement. http://www.FortisAlberta.com/Default.aspx?cid=170&lang=1
DEEMED FLAT	Applied to unmetered sites with a consistent load profile that does not qualify as Pumping or Lighting profiles, such as digital carrier traffic signals and cathodic protection services.
DEEMED PUMPING	Used for oil and natural gas field services, both cumulative metered and unmetered. The deemed consumption varies by hour and remains constant from day to day throughout the year. The motor horsepower of the service and a load factor of 40% are used to calculate the consumption of unmetered pump jack services.
DEEMED LIGHTING	Used for streetlights and yard lights. Lighting deemed consumption is based on historic analysis of monthly burn hours combined with wattage and ballast efficiency ratings. For example, a 150 W HPS light uses 150 W in the bulb and 42 W in the ballast for a total of 192 watt-hours per hour. The deemed consumption varies daily along with daytime and nighttime hours and monthly with seasonal daylight hours.
DEEMED IRRIGATION	Used for cumulative-metered irrigation sites. The deemed consumption does not vary by hour in a day and is seasonal (April-October), consistent with the expected irrigation requirements throughout the year. The April-October irrigation season is supported both by load research done on irrigation in the early 1990s and by current irrigation sites with interval meters which show evidence of some consumption in April. Cumulative-metered irrigation sites are not allocated any energy during the months of November to March.

Please refer to the Profile and Loss Matrix in Appendix D of this Guidebook to cross reference the profile to the corresponding FortisAlberta rate. Copies of the underlying profiles are available on our website at www.FortisAlberta.com under Retailers → Load Settlement.

<http://www.FortisAlberta.com/Default.aspx?cid=170&lang=1>

Additionally, the Settlement Profile Information (SPI) transaction in the SSC is made available to all Retailers, along with the settlement results, to show the NSLS and deemed profiles used for each settlement run.

Profile Freezing: The SSC states that the residual profile and each class load profile must be frozen on its first usage for all MAAT settlement runs. As such, FortisAlberta freezes profiles for all settlements, as per section 6.1.

Profiling Cap: To ensure accuracy, FortisAlberta installs interval meters at no additional cost to Customers with a demand 500 kW or larger.

FortisAlberta will install interval metering for sites with a demand below 500kW. The load for the site will be settled based on the interval meter readings versus its designated class profile. Please refer to Appendix A - Fee Schedule contained in this Guidebook.

Metering Data: The Meter Data Manager (MDM) is responsible for providing metering data. The LSA is responsible for providing consumption estimates for settlement purposes if a meter read is not available.

Unmetered Loads: On an individual site basis for unmetered loads, the deemed consumption used in Load Settlement will be provided to the Retailer using the standard consumption transaction (i.e. Daily Cumulative Meter (DCM)).

Line Loss Calculation: Distribution line loss formulas are established and allocated to the sites by the WSP. The LSA may:

- Calculate losses on a Customer-specific basis and aggregate those losses to the Retailer or
- Calculate total losses based on POD load and then allocate those losses to the Retailer.

FortisAlberta uses the “bottom-up” approach to calculate loss estimates. Each site will be assigned a loss class with a defined loss factor. The loss percentages are static. Please refer to the matrix in Appendix D of this Guidebook that cross-references the loss classes and percentages to the corresponding FortisAlberta rate.

Unaccounted For Energy (UFE): The hourly UFE is the total system load for the hour MINUS the sum of the allocated hourly loads at the Customer meters plus their allocated losses. UFE is allocated proportionally to all sites within the settlement zone. FortisAlberta has a single settlement zone in which all sites that are not connected directly to the transmission system are settled and allocated as UFE.

Settlement Calculation Results

Basic AESO Invoice Requirements: LSAs are required to provide a Wholesale Settlement Information (WSI) transaction with the Retailer-total results per settlement zone including a breakdown of settled load, distribution loss allocation, and UFE allocation for each hour.

Site-Specific Settlement Results: FortisAlberta currently offers Retailers daily consumption on a site-specific basis through an official transaction known as the Wholesale Settlement Details (WSD) as per Section 9.6.2.6 of the SSC.

Profiles: The profiles used in each settlement run are sent out along with the settlement results. FortisAlberta freezes the NSLS profile for all settlement runs. FortisAlberta does not provide Retailers or Customers with forecasts of load profiles.

Retailer Verification of AESO Invoice: LSAs are to provide sufficient information, on request, for a Retailer to reconstruct interim and final settlement calculations for its own Customer sites. This includes a snapshot of the Load Settlement input database at the run “as at” date/time. FortisAlberta meets this requirement by providing Retailers with all metering inputs plus frozen profiles and site-specific daily results.

SETTLEMENT ERROR CORRECTIONS

Handling of Errors and Disputes of Load Settlement Results:

Settlement disputes will be handled as outlined in the SSC, Section 5 - Settlement Error Correction. FortisAlberta will not accept measurement disputes of the initial settlement.

Dispute Resolution - Load Settlement:

Procedures for dispute resolution among parties affected by settlement calculations are described in the SSC, Section 5.3.4 – Dispute Resolution.

Resolution by FortisAlberta and Responsible Party:

Disputes between FortisAlberta and a Responsible Party with the respect to the T&Cs, shall be resolved as soon as possible in an amicable manner, as defined in Article 13.1 of the FortisAlberta's Retailer T&Cs.

RETAILER INQUIRIES

FortisAlberta's Retailer Inquiry Tracking System (RITS) manages Retailer General Inquiries, Pre Final Error Corrections (PFEC) and Post Final Adjustment Mechanisms (PFAM) from receipt to resolution. A RITS ticket **must** be created to log:

General Inquiries – May include questions or concerns regarding rates, DCMs, site statuses and billing data. FortisAlberta's Service level is ten (10) business days with the exception of adjustment requests.

Pre Final Error Correction (PFEC) –PFEC is a formal mechanism that corrects settlement errors prior to a subsequent settlement run and ultimately improves settlement results before final settlement. PFEC ticket error types are limited to those identified in Section 5.2.1 of the SSC. Service levels for PFECs are also outlined in the SSC.

Post Final Adjustment Mechanism (PFAM) – PFAMs are similar to PFECs but occur after final settlement. Service levels for PFECs are also outlined in the SSC.

Retailers must enter a valid Retailer and Site ID in the RITS ticket so that FortisAlberta can confirm the Retailer of Record for the site in question.

Access to the RITS system is available on the FortisAlberta website at www.FortisAlberta.com

1. Select "Retailer".
2. Select "Retailer Inquiry Tracking System".
3. Choose either: PFEC, PFAM or General Inquiry from the drop down menu.

<http://apps.FortisAlberta.com/rits/jsp/mainpage.jsp>

If you have any questions please do not hesitate to contact the Retail Support Team at RetailSupport@FortisAlberta.com.

WHOLESALE BILLING FOR DISTRIBUTION ACCESS

FortisAlberta will bill all Distribution Tariffs through the end-use Customer's Retailer as per Alberta Regulation 159/2003– Billing Regulation 2003 (as amended from time to time).

Typically, there are two (2) separate Retailer invoicing runs each month. For the first invoicing run, Retailers will receive an invoice on the sixth (6) business day of each month, which is the main invoice for the Distribution Tariff. The second invoicing run is for the Direct Connect Customers. Retailers should receive this invoice on the fifteenth (15) business day of each month. Only Retailers who have Direct Connect Customers receive the second invoice.

- Tariff Bill File (TBF) information will be sent to Retailers in accordance with FortisAlberta's Tariff Bill Calendar File (TCF).
- The record format and rules surrounding the file format are set out by the AUC in Rule 004: The Alberta Tariff Billing Code (formerly known as Directive 012). Rule 004 can be reviewed at the AUC's website; <http://www.AUC.AB.ca/acts-regulations-and-auc-rules/rules/pages/rule004.aspx>.

All detailed meter information is provided to Retailers through the Load Settlement System according to its associated schedule.

The Retailer is expected to indicate, on the Customer's account, the information as identified in the Alberta Regulation 290/1999 – Billing Regulation (as amended from time to time) in Sections 4 and 4.1.

The payment terms for Retailers are specified in the approved FortisAlberta Retailer T&Cs of Distribution Access Service.

MICRO-GENERATION

Effective February 2008, the AUC introduced the Micro-Generation Regulation (AR 27/2008) that allows Albertans to generate their own environmentally-friendly electricity and receive a credit from their Retailer for power they send back into the Alberta electrical grid.

Micro-generation has been defined by the Regulation as: “being one megawatt or less, connected to the distribution system, with the generator intended to meet all or a portion of the Customer’s electricity needs.” Micro-generation units must use electricity generated by a renewable, environmentally-friendly fuel source such as solar, small-scale hydro, wind, biomass, micro-cogeneration and fuel cells.

Three (3) categories based on size have been defined as follows:

- Mini micro-generation for units with a total nominal capacity of no more than 10 kW (defined in Rule 024 – Rules Respecting Micro-Generation).
- Small micro-generation for units with a total nominal capacity of less than 150 kW.
- Large micro-generation for units with a total nominal capacity of at least 150 kW but not exceeding 1 MW.

Additional information may be obtained from the AUC website:

- [Http://www.AUC.AB.ca](http://www.AUC.AB.ca).
- [Http://www.AUC.AB.ca/rule-development/micro-generation/pages/default.aspx](http://www.AUC.AB.ca/rule-development/micro-generation/pages/default.aspx).
- [Http://www.AUC.AB.ca/acts-regulations-and-auc-rules/rules/Pages/Rule024.aspx](http://www.AUC.AB.ca/acts-regulations-and-auc-rules/rules/Pages/Rule024.aspx).

Micro-Generation Business Transactions

The Site ID catalogue will identify a Site ID with an active micro-generator by an indicator of “Y” in the Micro-Generator Indicator field (the last field).

The Micro-Generation Retailer Notification (GRN) transaction will notify the Retailer of Record upon enrollment that a micro-generator is commissioned at the Site ID location. It will also notify the Retailer of Record that a micro-generator has been de-commissioned.

The Micro-Generation Cumulative Meter Consumption (GCM) and the Micro-Generation Interval Meter Readings (GIM) transactions will communicate to the Retailer the energy sent to the electrical grid by the micro-generator using cumulative and interval meters respectively.

Using the information above or by estimation, as applicable, the Retailer is then expected to create the Micro-Generation Retailer Summary (GRS) and deliver it to the AESO once per month for all “small” micro-generators. The GRS will identify the Customer credit for power they sent to the grid. The AESO provides the Daily System Measurement (DSM) to the Retailers for large micro-generators.

Further details and transaction layout specifications are available in the SSC.

RULE 010 - RULES ON STANDARDS FOR REQUESTING AND EXCHANGING SITE-SPECIFIC HISTORIC USAGE INFORMATION FOR RETAIL ELECTRICITY AND NATURAL GAS MARKETS

Effective June 2008 the AUC implemented Rule 010 - Rules on Standards for Requesting and Exchanging Site-Specific Historic Usage Information for Retail Electricity and Natural Gas Markets. Rule 010 outlines business processes and rules that govern the exchange of site-specific historic usage information between a WSP and a Retailer.

Rule 010 requires all Retailers to provide FortisAlberta with a Representation and Warrant document as proof that the Retailer has obtained Customer consent. A new Representation and Warrant document is required for each new Historical Consumption Request Agreement. A Historical Consumption Request Agreement form can be found on FortisAlberta's website at: <http://www.FortisAlberta.com/Default.aspx?cid=94&lang=1>

As outlined in Rule 010, Retailer responsibilities include:

- Obtaining Customer consent prior to requesting all historical consumption information from FortisAlberta.
- Documenting all Customer consent in a consistent and verifiable format.
- Issuing a Request for Usage (RFU) transaction via DropChute™. The RFU transaction provides a mechanism for Retailers to request site-specific historic usage and demand information.

FortisAlberta's responsibilities include

- Validating each RFU received from Retailers.
- Gathering the historical usage and demand information for a particular site.
- Issuing a Historic Usage File (HUF) transaction via DropChute™, in response to the RFU. The HUF transaction presents site-level historic usage and demand information for a period of time not greater than 425 days. The HUF is presented in a hierarchical structure which presents summary site information, detailed historic usage information, detailed historic interval usage information, detailed historic demand information, and summary file information. The HUF is provided and transmitted as a comma separated value (CSV) file.

Please visit the AUC's website <http://www.Auc.Ab.Ca/acts-regulations-and-auc-rules/rules/Pages/Rule010.aspx> for additional information on Rule 010.

PROVIDING SERVICES TO RURAL ELECTRIFICATION ASSOCIATIONS (REAS) IN THE FORTISALBERTA SERVICE AREA

There are presently twenty-two (22) REAs within the FortisAlberta service area. FortisAlberta has a WO Agreement with each one of these REAs and at present there are two different versions of this agreement in place.

Of the twenty-two (22) REAs, there are fifteen (15) FortisAlberta Operated REAs which have a Distribution System Operators Agreement (DSO) in place. The DSO Agreement allows FortisAlberta to take on responsibilities and to act as the WSP on behalf of the REA. Any REA that has a DSO Agreement with FortisAlberta has Site IDs that have the same prefix as FortisAlberta owned Site ID's (0040).

Each REA is a distribution system owner and must have an RSA signed with each Retailer operating in the REAs service area. REAs provide distribution services to Customers meeting specific eligibility requirements as per their WO Agreement with FortisAlberta. A Retailer must have an executed RSA with an REA in order to enroll REA member sites.

The following fifteen (15) FortisAlberta Operated REAs require an REA RSA:

1. Armenia REA
2. Drayton Valley REA
3. Ermineskin REA
4. Kingman REA
5. Lindale REA
6. Mayerthorpe & District REA
7. Montana REA
8. Niton REA
9. Peigan REA
10. Stony Plain REA
11. Tomahawk REA
12. VNM REA
13. Wildwood REA
14. West Liberty REA
15. West Wetaskiwin REA

Of the twenty-two (22) REAs, there are seven (7) Self-Operating REAs within FortisAlberta's service area. Self-Operating REAs operate and maintain their own distribution systems, including metering, construction, and system transactions, and Site IDs. To sign up members of a Self-Operating REA, Retailers must have an REA RSA signed with the appropriate REA allowing access to their members. Below is a list of Self-Operating REAs within the Service Area of FortisAlberta:

1. Battle River REA
2. Central Alberta REA
3. Duffield REA
4. North Parkland Power REA
5. Rocky REA
6. SouthAlta REA
7. WildRose REA

Enrollment of REA Sites for Self-Operating REAs

FortisAlberta does not process enrollments for Self-Operating REA sites because those REAs are responsible for this function. REAs communicate Retailer information to the LSA, (FortisAlberta) using WO to WO transactions, such as Site Characteristics (SCA)

The following web page link provides a map showing the location of each REA in Alberta
[http://www1.agric.gov.ab.ca/general/progserv.nsf/all/pgmsrv14/\\$FILE/rea2007tabloid.pdf](http://www1.agric.gov.ab.ca/general/progserv.nsf/all/pgmsrv14/$FILE/rea2007tabloid.pdf)

For additional information on REAs, please feel free to contact:

Mr. Tom Kee

Manager, Rural Electric Programs and Information Services, Alberta Government

(780) 427-0944 Direct Line

(780) 422-1613 Fax

Tom.Kee@gov.ab.ca

SERVICE LEVEL - DISTRIBUTION OPERATIONS

Purpose

This section outlines FortisAlberta's service level commitments for Customer or Retailer requests.

Conditions

- FortisAlberta's Standard Level of Service is comparable to a Priority Level 5 (Standard Service Level – 3 business days) as outlined in the SSC.
- Unless otherwise specified, services are offered between the hours of 08:00 - 16:00, Monday to Friday, excluding statutory holidays.
- Service levels are tracked from time **received and verified** in the FortisAlberta Dispatch Centre and are based on our total service territory, not on the service provided to any one Retailer.
- Service levels will not apply when FortisAlberta is faced with a large volume of unplanned power outages, trouble calls or when the daily volume of a single request type exceeds 200.¹
- Priority 1 (Energize Next Available Power Line Technician (PLT)) requests are only accepted in emergency situations which are classified as:
 - Life threatening situation (e.g. occupant is on oxygen),
 - Weather related (during extreme weather conditions),
 - Safety issue, and/or
 - WO or Retailer error
- Priority 2 requests are completed within 24 hrs, 7 days a week. Priority 2 is classified as:
 - Reconnection for Non-Payment
 - Reconnection for Vacant Premise (1301 & 1302)
- Normal Retailer Requests within Settlement System Guidelines are indicated in Appendix B – Normal Retailer Requests.

Reconnect Fees

FortisAlberta posts a reconnect fee based on the time and date FortisAlberta receives the Priority 1 or Priority 2 Energize Request (ENR) transaction. Please note that FortisAlberta's hours of operation are Monday to Friday 08:00 – 16:00.

Priority 1 Reconnect Fees are subject to change from time to time upon AUC approval:

- **Scenario 1:** If a Priority 1 ENR transaction is received during regular business hours, the next available PLT will energize the service.
 - FortisAlberta will post a \$90 reconnect fee + a \$90 rush connection fee (excluding GST).
- **Scenario 2:** If a Priority 1 ENR transaction is received outside regular business hours, the next available PLT will energize the service.
 - FortisAlberta will post an after-hours reconnection fee of \$250 (excluding GST).

Priority 2 Reconnect Fees are subject to change from time to time upon AUC approval:

¹ Emergency response and unplanned power outages will be responded to immediately, 24 hours/day, 7 days/week and prioritized along with any other emergency/outage requests in the queue.

- **Scenario 1:** If a Priority 2 ENR transaction is received between Sunday at 16:00 and Friday at 16:00 the service will be reconnected within 24 hours.
 - FortisAlberta will post a reconnection fee of \$90 (excluding GST).
- **Scenario 2:** If a Priority 2 ENR transaction is received between Friday at 16:00 and Sunday at 16:00 the service will be reconnected within 24 hours.
 - FortisAlberta will post an after-hours reconnection fee of \$250 (excluding GST).

As mentioned above, unplanned power outages are the top priority and may impact the completion of ENRs. If a large volume of ENRs are received, FortisAlberta will continue to negotiate completion times.

Exception to the above:

- If FortisAlberta receives an escalation from a Retailer of Record requesting a service be reconnected during overtime hours (up to 22:00), FortisAlberta will do so and charge \$250.00 (excluding GST).

The Retailer of Record must submit a Priority 1 ENR and:

- **During business hours,** contact the Retail Support Team (403) 514-4990 and send an e-mail to RetailSupport@FortisAlberta.com which includes the Site ID, customer name and the name of the Supervisor authorizing the \$250.00 (excluding GST) charge.
- **Outside business hours,** contact 310-WIRE (9473) and send an e-mail to RetailSupport@FortisAlberta.com as well as the 310-WIRE (9473) Contact Centre Agent prior to any action being taken. The e-mail must include the Site ID, reason for the Priority change, customer name and the name of the Supervisor authorizing the \$250.00 (excluding GST) charge.

CONTACT CENTRE

Contact Centre contact information and operational hours:

- 310-WIRE (9473) from anywhere in Alberta
- Emergency: 24 hours a day, 7 days a week
- Customer Service: Monday to Friday (7:00 AM – 10:00 PM); Saturday (8:00 AM – 8:00 PM); Sunday and Statutory Holidays (9:00 AM – 6:00 PM).

The FortisAlberta Contact Centre, located in Airdrie, provides service for Customers in the FortisAlberta service territory. It is also the central point of contact for all departments within FortisAlberta.

Contact assistance for Retailers is coordinated through the Retail Support Team who can be reached at (403) 514-4990 between the hours of 7:30 AM – 4:30 PM. In the event of an after-hours emergency situation, please call the Contact Center at 310-WIRE (9473) for assistance.

The Contact Centre's first priority is to respond to trouble calls, working closely with the Dispatch Team to process work to the lineman in FortisAlberta's service territory.

Customers may also call the Contact Centre for the following types of requests:

- Automated Metering Infrastructure (AMI).
- Energy efficiency tips.
- Meter reads.
- Power outage reporting.
- Power quality issues.
- Requests for construction of new services.
- Safety questions, including electric magnetic fields concerns.
- Vegetation management concerns.

If you have any questions or concerns regarding the Contact Centre team, please contact:

Jocelyn Marshall
Supervisor, Customer Relations
(403) 514-4756 Direct Line
(403) 514-5756 Fax
(403)-710-4938 Cellular

Jocelyn.Marshall@FortisAlberta.com

Ruth Derbowka
Supervisor, Customer Relations
(403) 514-4619 Direct Line
(403) 514-5619 Fax
(403) 809-4822 Cellular

Ruth.Derbowka@FortisAlberta.com

Heather Neufeld
Manager, Customer Relations
(403) 514-4603 Direct Line
(403) 514-5603 Fax
(403) 804-4375 Cellular

Heather.Neufeld@FortisAlberta.com

SITE MANAGEMENT

The Site Management team is responsible for the system maintenance of sites within FortisAlberta's system of record from the initial date of energize to de-energize or salvage, in accordance with the FortisAlberta T&Cs. This encompasses all Customer rate segments including Residential, Farm, Irrigation, REA, Oil & Gas, Commercial, Streetlights and Yardlights. The team performs such functions as processing salvages; de-energize requests, rate changes, load changes, and breaker changes.

APPENDIX A – THE CUSTOMER/RETAILER T&CS FEE SCHEDULE

The fees and charges indicated by this schedule are non-refundable and are charged to the Retailer for flow-through to the Customer, unless otherwise specified.

#	DESCRIPTION	FEE
1	<p>Reconnection Fee This fee is applicable when the Retailer has initiated a reconnect request be completed during 8:00 AM – 4:00 PM Monday – Friday, including:</p> <ul style="list-style-type: none"> • Electrical non-compliance. • Non-payment. • Customer initiated alterations to the electrical system. • Reconnect from a Customer requested Disconnect. 	\$90.00 reconnection fee plus an additional \$60.00 fee if reconnected after a Customer requested disconnect and if no Idle Charges are assessed.
2	<p>Off-Cycle Meter reading This fee is applicable when an off-cycle meter reading is requested.</p>	\$35.00
3	<p>Interval Meter Installation For Interval Meter installation at Points of Service with a Contract Minimum Demand of less than 333 kW (which coincides with an Operating Demands of less than 500 kW) (does not apply to DG Customers who own and poll the meters). This will be charged directly to the Customer.</p>	Incremental cost on a per site basis (including time and materials but excluding additional cost of meter itself)
4	<p>Meter Testing This fee is applicable when a request to test a meter is received. The fee is collected and refunded if the meter is found to be faulty. This may be charged directly to the Customer.</p>	\$50.00 residential/farm \$100.00 all others
5	<p>Meter Signal This fee is applicable for the time and material associated with the meter signal requests. Costs can vary a great deal by service and must be determined on a site-by-site basis. This will be charged directly to the Customer.</p>	Cost to be determined on an individual site basis. \$25.00/hr for regular meter \$50.00/hr for interval meter 1 hour minimum
6	<p>No Access This fee is applicable to the Customer when access to a site is considered by FortisAlberta's employees, agents or other representatives as unsafe or is otherwise prevented, hindered or refused.</p>	\$90.00
7	<p>Customer Usage Information Request Less Than or Equal to 12 Months This fee is applicable when a request for specific Customer Usage Information is made for less than or equal to 12 months of Load history. This will be charged directly to the requesting party.</p>	Fee set to zero on an interim basis (per 2005 Distribution Tariff Negotiated Settlement Agreement approved in Decision 2005-053)
8	<p>Customer Usage Information Request Greater Than 12 Months This fee is applicable when a request for specific Customer Usage Information is made for greater than 12 months of Load history. This will be charged directly to the requesting party.</p>	\$25.00/hr for regular meter \$50.00/hr for interval meter 1 hour minimum

9	<p>Settlement History or Confirmation of Settlement Data This fee is applicable when a Retailer requests that an investigation be performed of suspect Load Settlement data. In the event that the data is, in the opinion of FortisAlberta, substantively incorrect, the fee will be waived. This will be charged directly to the requesting party.</p>	<p>\$25.00/hr for regular meter \$50.00/hr for interval meter 1 hour minimum</p>
10	<p>Rush Connection This fee is for Retailer requests to connect the Customer immediately. This is not available for the purposes of getting priority service.</p>	<p>\$90.00</p>
11	<p>After-Hour Reconnection Fee This will be charged to the Retailer when the Customer's service is connected outside regular business hours, weekdays 8:00 – 4:00. FortisAlberta will: time permitting; do reconnects between 4:00 and 10:00 pm at overtime rates.</p>	<p>\$250.00</p>
12	<p>Service Trips</p> <p>a) This fee is applicable to the Customer when multiple trips to a Customer's service are required for any of the following:</p> <ul style="list-style-type: none"> • Electrical non-compliance at service location, at new service or reconnection of existing service • Unsafe conditions • Customer deficiency <p>b) A Customer or other Responsible Party will be required to pay the actual costs of a Customer (or Responsible Customer, as the case may be) requested service call if the source of the problem is determined to be that party's facilities.</p>	<p>\$45.00</p> <p>Cost to be determined on an individual basis</p>
13	<p>Site ID Search This fee is applicable when a site ID has been requested which already exists in the wire service provider site ID catalogue.</p>	<p>\$15.00</p>
14	<p>Cancellation This fee is applicable when a request is cancelled or deferred after the field staff has been mobilized. This may be charged directly to the Customer.</p>	<p>\$45.00</p>
15	<p>Returned Cheques This fee is applicable for each cheque returned to FortisAlberta for any reason. This will be charged directly to the defaulting party.</p>	<p>\$20.00</p>
16	<p>Excess Wattage Festive lighting service is available to municipalities who require decorative lighting for the Christmas season or other festive occasions during the months of December through February. A municipality may install festive lighting with a total wattage of up to 15% of their total street lighting wattage for a six week period at no charge. Any wattage in excess of 15% is charged the Excess Wattage charge. This will be charged directly to the municipality.</p>	<p>\$1.00 per kW per day</p>

APPENDIX B – NORMAL RETAILER REQUESTS

SERVICE	DESCRIPTION	STANDARD SERVICE LEVEL	SSC
CUSTOMER CONNECTION (ENERGIZE)	Connection of existing or newly constructed sites, having all necessary equipment, connections and permits in place. This includes installation of a meter, connection to source and flat rate services.	Within 3 full working days	ENR
RECONNECT CUSTOMER	<p>Retailer has initiated a reconnection request to be completed for:</p> <ul style="list-style-type: none"> • Electrical non-compliance • Reconnect after Non-Payment • Customer initiated alterations to the electrical system • Reconnect from a Customer-requested disconnect • Vacant premise reconnection <p>FortisAlberta will, time permitting and at overtime rates after 16:00, perform reconnects up to a maximum of 22:00 and resume connections at 08:00 the next day. Safety, life threatening, weather related or WO/Retailer error are four conditions under which FortisAlberta would perform a reconnection past 22:00.</p>	Next Available PLT to within 24 hours	ENR
CUSTOMER DISCONNECTION (DE-ENERGIZE REQUEST (DER))	<p>Disconnection of existing service to prepare it for salvage or idle service. Normally performed when a Customer will no longer be attached to the site. Reason Codes:</p> <ul style="list-style-type: none"> • 0001 Customer Request • 0003 Premise Demolished • 0005 Seasonal Shut off • 0006 Vacant Premises <p><i>Note: timelines for full salvage of facilities will be negotiated.</i></p>	Within 3 full working days	DER
DISCONNECT FOR NON-PAYMENT	Disconnection of Customer for the purposes of collections. Reason Code: 0002	3 full working days	DER
OFF-CYCLE METER READ (ROR)	Any meter reads requested off the normal meter reading cycle.	5 full working days	ROR
METER DISPUTES	Initial visit to investigate meter reading dispute. Further visits may be required to complete investigation.	3 full working days	ROR

APPENDIX C – ADDITIONAL RESOURCE WEB PAGE LINKS:

REFERENCE	DETAILS	WEB PAGE LINKS
AUC	The AUC is a quasi-judicial independent agency established by the Government of Alberta, responsible to ensure that the delivery of Alberta's utility service takes place in a manner that is fair, responsible and in the public interest.	http://www.auc.ab.ca/Pages/Default.aspx
AESO	The AESO leads the planning and operation of the power system, facilitates competitive electricity markets and ensures open access to the grid.	www.AESO.ca
CUSTOMER CHOICE	The UCA works to ensure Alberta consumers have the information, representation and protection they need in Alberta's restructured electricity and natural gas markets.	http://www.UCAhelps.gov.ab.ca/4.html
FORTISALBERTA	FortisAlberta's primary focus is the safe and reliable delivery of electricity to our customers in Alberta. FortisAlberta is dedicated to providing exemplary customer service to meet the needs of more than 463,000 customers in more than 175 communities in Alberta.	www.FortisAlberta.com
FORTISALBERTA'S CUSTOMER TERMS AND CONDITIONS	The interim 2010 Customer T&Cs are intended to govern the relationship between FortisAlberta and customers.	http://www.fortisalberta.com/data/1/rec_docs/707_Interim2010CustomerTermsAndConditions_2009-10-16_Appendix2.pdf
FORTISALBERTA GUARANTEE AGREEMENT	This document is a guarantee agreement acceptable to FortisAlberta as per the FortisAlberta Retailer T&Cs.	http://www.fortisalberta.com/data/1/rec_docs/263_FortisAlbertaGuaranteeAgreement.pdf
FORTISALBERTA'S GUIDE TO CUSTOMER CONTRIBUTIONS	The Guide to Customer Contributions is a toll to assist customers in FortisAlberta WO area to understand the application of FortisAlberta's investment policy.	http://www.fortisalberta.com/data/1/rec_docs/55_Guide_to_Customer_Contributions_(January_2007)_v4.doc
FORTISALBERTA'S HISTORICAL CONSUMPTION REQUEST AGREEMENT	A Retailer must provide to the Distributor a representation and warrant document. This document is to be recognized as being demonstrative proof that customer consent was obtained by the Retailer each time a Retailer initiates an RFU.	http://www.fortisalberta.com/data/1/rec_docs/534_HistoricalConsumptionRequestAgreement.pdf
FORTISALBERTA'S LOAD SETTLEMENT AGENT APPOINTMENT FORM	This document should be completed by the Retailer authorizing an agent for the purposes of exercising the rights and obligations of the Retailer.	http://www.fortisalberta.com/data/1/rec_docs/368_Agent_Appointment_Form_4-Jul-07.pdf

FORTISALBERTA'S PERMISSION TO RELEASE CUSTOMER CONTRACT INFORMATION	This document should be completed by the end use customer to request the release of customer contract information to a third party.	http://www.fortisalberta.com/data/1/rec_docs/319_Permission_Form_to_Release_Customer_Contract_Information.doc
FORTISALBERTA'S PERMISSION TO RELEASE ELECTRIC CUSTOMER LOAD DATA	This document should be completed by the end use customer to request the release of electric customer load data to a third party agent.	http://www.fortisalberta.com/data/1/rec_docs/439_Permission_Form_to_Release_Electric_Customer_Load_Data .pdf
FORTISALBERTA'S RATES, OPTIONS, AND RIDERS SCHEDULES	This document includes detailed Rate, Options and Rider breakdowns within FortisAlberta's WO area.	http://www.fortisalberta.com/data/1/rec_docs/709_2010InterimRatesOptionsRiders_2009-12-21.pdf
FORTISALBERTA'S RETAIL SITE CATALOGUE	This document provides legal descriptions and information to manage retail services.	http://www.fortisalberta.com/Resources.aspx?cid=238&lang=1
FORTISALBERTA'S RETAILER CREDIT APPLICATION FORM	This form is to be completed for all new Retailers that FortisAlberta will be dealing with. The information provided will be used to determine what, if any, level of credit will be granted to Retailers, in accordance with FortisAlberta's T&Cs.	http://www.fortisalberta.com/data/1/rec_docs/261_RetailerCreditApplicationform.pdf
FORTISALBERTA'S RETAILER GUIDEBOOK	The Retailer Guidebook outlines Retailer Certification Requirements and the steps required to provide Retailer Access Services in FortisAlberta's WO area. It contains key business processes, information exchange requirements, Government of Alberta Regulations and Codes and links to the Distribution Tariff and related policies that must be understood by Retailers and WOs.	http://www.fortisalberta.com/Default.aspx?cid=94&lang=1
FORTISALBERTA'S RETAIL SERVICE AGREEMENT - RURAL ELECTRIFICATION ASSOCIATION	This document is a formal agreement between Retailers and FortisAlberta acting as a WSP on behalf of an REA.	http://www.fortisalberta.com/data/1/rec_docs/711_RetailServiceAgreement_REA.pdf
FORTISALBERTA'S RETAILER SERVICE AGREEMENT	This document is a formal agreement between FortisAlberta and Retailers, and Self-Retailers.	http://www.fortisalberta.com/data/1/rec_docs/553_RetailServiceAgreement.pdf

FORTISALBERTA'S RETAILER TERMS AND CONDITIONS OF SERVICE	The Retailer T&Cs are intended to govern the relationship between FortisAlberta and Retailers, or any party who will be acting as an agent on behalf of a Retailer for transactions. These Retailer T&Cs also govern the relationship between FortisAlberta and a Customer of a Retailer, or any other party acting as an agent of the Customer, in their dealings with FortisAlberta.	http://www.fortisalberta.com/data/1/rec_docs/708 Interim2010RetailerTermsAndConditions 2009-10-16 Appendix2.pdf
FORTISALBERTA SERVICE AREA MAP	FortisAlberta delivers power to more than 175 communities in Alberta.	http://www.fortisalberta.com/Default.aspx?cid=101&lang=1
FORTISALBERTA'S SITE CYCLE CATALOGUE (SCF)	The SCF provides site and bill cycle information.	http://www.fortisalberta.com/Resources.aspx?cid=238&lang=1
FORTISALBERTA'S SITE ID REQUEST FORM	This document should be used if your search for a Site ID number in the FortisAlberta Site Catalogue is unsuccessful.	http://www.fortisalberta.com/data/1/rec_docs/51 Site ID E Form.xls
FORTISALBERTA'S SITE MANAGEMENT REQUEST FORM FOR OIL AND GAS (EXCEL)	The purpose of the Site Management form is to initiate service changes specific to oil and gas customers. The form should be used for processing flat to metered requests, review of minimum requests, load changes and salvage requests.	http://www.fortisalberta.com/data/1/rec_docs/323 Site Management Form.xls
FORTISALBERTA'S TARIFF BILL CALENDAR (TCF)	The TCF provides the bill cycle schedule.	http://www.fortisalberta.com/Resources.aspx?cid=238&lang=1
REA SERVICE AREA MAP	A map identifying the ATCO, FortisAlberta, and REA service area	http://www1.agric.gov.ab.ca/general/proqserv.nsf/all/pgmsrv14/\$FILE/rea2007tabloid.pdf
SETTLEMENT SYSTEM CODE RULES	Rule 021 outlines the SSC rules for market participants and can be found on the AUC website.	http://www.auc.ab.ca/acts-regulations-and-auc-rules/rules/Pages/Rule021.aspx
TARIFF BILLING CODE STANDARDS	The AUC developed a TBC that defines the necessary business rules and processes to enable the transfer of billing information between AUC-regulated electric and natural gas distribution companies and the Retailers.	http://www.AUC.AB.ca/acts-regulations-and-auc-rules/rules/Pages/Rule004.aspx

APPENDIX D – RATES – PROFILES AND LOSS MATRIX – (EFFECTIVE JANUARY 1, 2007)

RATE	OPTION	RATE NAME	PROFILE TYPE	DISTRIBUTION LINE LOSS %	LOSS GROUP CODE
RESIDENTIAL					
11	n/a	Residential Service	NSLS	4.18%	RESIDENT
FARM					
21	n/a	UNC Farm Service	NSLS	6.03%	UNCFARM
23	n/a	UNC Grain Drying Service	NSLS	6.03%	UNCFARM
2400	n/a	REA Farm Service	NSLS	6.03%	REAFARM
25	n/a	REA Large Farm Service	NSLS	6.03%	REAFARM
26	n/a	UNC Irrigation Service	IRRIGATION2000	2.80%	UNCIRRIGAT
26	n/a	UNC Irrigation Service effective April 1 st 2004	IRRIGATION2004	2.80%	UNCIRRIGAT
29	n/a	REA Irrigation Service	IRRIGATION2000	2.80%	REAIRRIGAT
29	n/a	REA Irrigation Service effective April 1 st 2004	IRRIGATION2004	2.80%	REAIRRIGAT
EXTERIOR LIGHTING					
31	n/a	Street Lighting Service (Invest. Option)	LIGHTING2000	3.44%	EXTERLITE
33	n/a	Street Lighting Service (No. Invest. Option)	LIGHTING2000	3.44%	EXTERLITE
37	n/a	Festive Lighting Service	LIGHTING2000	3.44%	EXTERLITE
38	n/a	Yard Lighting Service	LIGHTING2000	3.44%	EXTERLITE
COMMERCIAL					
41	n/a	Small General Service - without option D	NSLS	4.09%	SMGENERAL
41	D	Small General Service	FLAT2000	4.09%	SMGENERAL
43	n/a	Small General Temporary Service	NSLS	4.09%	SMGENERAL
44	n/a	Oil and Gas (Capacity) Service	PUMPING2000	8.18%	PUMPING
44	D	Oil and Gas (Capacity) Service	PUMPING2000	8.18%	PUMPING
45	n/a	Oil and Gas (Energy) Service	PUMPING2000	8.18%	PUMPING
GENERAL SERVICE					
61	n/a	General Service	NSLS	3.19%	GENERAL
61	D	General Service	FLAT2000	3.19%	GENERAL
63	n/a	Large General Service	Interval Metered	1.45%	LGGENTOU
64	n/a	Transmission Service (withdrawn)	n/a	n/a	6400
65	n/a	Direct Connected Service	Interval Metered	0.00%	DCONNECT
66	n/a	Opportunity Transmission	Interval Metered	3.19%	TEMPENERGY
WHOLESALE SERVICE					
81	n/a	Wholesale Service (closed 8/1/03)	Interval Metered	n/a	WHOLECLOSE

APPENDIX E – REVISIONS

02/01/2010 - The Retailer Guidebook has been reviewed and updated in its entirety.

New sections added:

- Providing Services to Rural Electrification Associates (REAs) in the FortisAlberta Service Area.
- Site Management.

Updated sections:

- The Stakeholder Relations Manager (SRM) – Retail Contacts
- Conditions for Providing Distribution Access Service to Retailers
- De-Select Request (DSR)
- Micro-Generation
- Contact Center
- Appendix B – Additional Resource Web Page Links
- Appendix F – Definitions

Deleted sections:

- Appendix A – Interim 2010 Customer, Retailer Terms and Conditions, and Distribution Tariff Rates, Options, and Riders schedules
- Appendix C – Additional FortisAlberta resource web page links
- Appendix D – Permission to Release Electric Load Data and Contract Information
- Appendix F – Settlement System Code exemptions granted to FortisAlberta by the AUC
- Appendix G – References and Web Links

FortisAlberta suggests replacing outdated Retailer Guidebooks with this 2010 updated version.

01/11/2008 – The Retailer Guidebook has been reviewed and updated in its entirety.

New sections added:

- Micro Generation.
- Rule 010.

Updated sections:

- Reconnect Fees.

FortisAlberta suggests any outdated Retailer Guidebook versions currently being referenced be recycled and replaced with Version 2010 Retailer Guidebook.

APPENDIX F – IMPROVEMENTS

FortisAlberta is committed to improving processes whenever possible. If you have suggestions for improving or clarifying this document, please contact:

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APPENDIX G – DEFINITIONS

ACRONYM	DEFINITION
AESO	Alberta Electric System Operator
AMI	Automated Metering Infrastructure
AUC	Alberta Utilities Commission
CSV	Comma Separated Value
DCM	Daily Cumulative Meter
DER	De-Energize Request
DSM	Daily System Measurement
DSO	Distribution System Operators Agreement
DSR	De-Select Request
ENR	Energize Request
EUA	Electric Utilities Act
FTA	Fair Trade Act
GCM	Micro-Generation Cumulative Meter Consumption
GIM	Micro-Generation Interval Meter Readings
GRN	Micro-Generation Retailer Notification
GTS	General Tracking System
HUF	Historic Usage File
LSA	Load Settlement Agents
MAAT	Month-At-A-Time
MDM	Meter Data Manager
MSA	Market Surveillance Administrator
NSLS	Net System Load Shape
PFAM	Post Final Adjustment Mechanism
PFEC	Pre-Final Error Correction
PLT	Power Line Technician
POD	Point of Delivery
PPO	Planned Power Outage
REA	Rural Electrification Association
RFU	Request for Usage
RITS	Retailer Inquiry Tracking System
ROR	Request Off-Cycle Meter Read
RRO	Regulated Rate Option
RRP	Regulated Rate Provider
RSA	Retail Service Agreement
SCA	Site Characteristics
SCF	Site Cycle Catalogue
SSC	AUC Rule 021: Settlement System Code Rules
SPI	Settlement Profile Information
SRN	Select Retailer Notification
SRO	Notify Old Retailer
SRR	Select Retailer Request
SRM	Stakeholder Relations Manager
T&C	FortisAlberta Terms and Conditions
TBF	Tariff Bill File
TCF	Tariff Bill Calendar File
UCA	Office of the Utilities Consumer Advocate
UCI	Update Customer Information
UFE	Unaccounted for Energy
WO	Wire Owner
WSD	Wholesale Settlement Detail transaction
WSI	Wholesale Settlement Information transaction
WSP	Wire Service Provider